

User Documentation

A Fundamental Course
for Data Processors and Managers



The Keys to:

- Designing It
- Managing It
- Supporting It

LOS ANGELES, CA/DETROIT, MI/ROCHESTER, NY
PORTLAND, OR/PITTSBURGH, PA/PHILADELPHIA, PA

American Institute for Professional Education



USER DOCUMENTATION

A Fundamental Course for Data Processors and Managers

Los Angeles, May 4-5/Detroit, May 18-19/Rochester, June 1-2
Portland, May 11-12/Pittsburgh, May 28-29/Philadelphia, June 8-9

COURSE MATERIALS

Each participant will receive (to retain after the Workshop):

A Course Workbook: This manual contains outlines, examples, reference materials, and instructions on all the subjects taught in the Short Course. Case studies and assignments are also contained in this manual.

A Flowcharting Kit: A template and graphic materials necessary to complete course assignments and aid in designing user documentation.

*Documentation sells the system. No system functions until the "how-it-works" message has been communicated and positively received by the people who are buying it. Clear, concise user documentation is required to get the message across—**user documentation pays for itself many times over by avoiding costly mistakes, reruns and delays.***

In the past, documentation has been an afterthought of the system designer. Yet today, in an age of distributed processing, remote terminals and minicomputers, it must be an integral part of the system. Professional system builders recognize this need for quality user documentation.

The American Institute presents this special purpose two-day seminar/workshop for EDP professionals interested in quality user documentation. Participants learn by doing, via case studies, lecture, and discussion.

The American Institute's Short Course is structured to facilitate quick, efficient assimilation of documentation skills and techniques. This is accomplished through a "learn and apply" approach, both in the classroom and on-the-job. Knowledge

acquired via workshop discussion, lecture and written assignments is to be directly applied in the six month follow-up service. Participants who submit actual job documentation for review and critique receive measurable recognition of their success.

The six month follow-up service is an integral part of the study process. The American Institute has established an important precedent for its participants. Students who successfully complete the User Documentation program will be certified in this highly competitive field.

WHO SHOULD ATTEND

1. Managers in the Data Processing group who are responsible for preparation and distribution of documentation.
2. Systems Analysts, Programmers, and Documentors who are assigned to write user documentation.
3. Managers in the functional department who use user documentation of computerized systems.

THE SIX MONTH FOLLOW-UP SERVICE

An important goal of this seminar is to improve the way participants handle real on-the-job documentation. To aid participants with their documentation work, the Course Director will review and critique one user manual per participant submitted to him within six months of the seminar. This Documentation Clinic is included in the seminar fee. Upon completion of the six month program, participants will be certified in the User Documentation field.

COURSE DIRECTORS

Donald J. Gibbs, CDPA, has over 15 years of experience in systems design, training, documentation and corporate administration of EDP. He spent several years with a national CPA firm where he was heavily involved in audit software. He also served for several years as a corporate director of data processing, responsible for a multi-site operation. Currently, Mr. Gibbs is Director of Consulting Services with Stephen P. Radics & Co., a CPA firm, where he is responsible for proprietary software and a wide variety of consulting assignments.

Henry I. Faber is President of CH Management, Inc., a management consulting organization specializing in developing computer-based financial control systems, in-house and public seminars in the financial and data processing areas, and conducting administrative efficiency reviews. Prior to joining CH Management, Inc., Mr. Faber was affiliated with such organizations as ADT Security Systems and N.L. Industries. He also has been on the faculty for St. John's University, New York. Mr. Faber is a member of the Association for Systems Management and the National Association of Accountants.

"Enjoyed the course and picked up several practical tips that I only wish I had known a month ago! Thanks for the individual help too."

— Paula Balch, Xerox Corporation, Systems Analyst

"As a member of senior management in my company, I had no technical knowledge of the overall course of instruction covered. This seminar was extremely valuable to me in relating to our D.P. department, its people and its problems. Very valuable to me in specifics also; a good balance of the elementary and the technical."

— Ivan C. Peck, Moore Mortgage Company, Senior Vice President

COURSE OUTLINE

I. Documentation: What and Why?

- A. Contents
- B. Function
 - 1. Reference Material
 - 2. How-To Material
 - 3. Teaching Material
- C. Types of Documentation
 - 1. Customer Oriented
 - a. Software
 - b. Hardware
 - 2. Internal
 - a. Software
 - b. Hardware
 - c. Policy and Procedure
- D. Case Problems
 - 1. Contents Matrix
 - 2. Audience Matrix

II. The Documentation Plan

- A. Scoping the Documentation
- B. Defining Work Tasks
- C. Defining Documentation Tasks
- D. The Planning Worksheet
 - 1. Scope
 - 2. Tasks
 - 3. Man-Hour Estimates
- E. Case Problems

III. Documentation Economics

- A. Costs, Benefits and Company Policy
- B. Budgeting Procedures
 - 1. Whose Budget?
 - 2. What Costs?
 - 3. Costs of Revisions
 - 4. Overrun and Underrun
 - 5. Fixed Costs and Variable Costs
- C. Cost Estimation
 - 1. The Cost Worksheet
 - 2. Hourly Rates
 - 3. Purchased Items
- D. Case Problems

IV. Documentation Standards

- A. The Case of Minimum Standards
- B. The Case for Style Standards
- C. Standardizing Revisions
- D. Administering Standards
- E. The Standards Manual: Pro and Con

V. Documentation Control and Maintenance

- A. Distribution Control
- B. Revision Control
- C. Restricted Information

VI. Training

- A. Purpose
- B. Planning the Training Program
- C. User Confidence
- D. Sample Training Program

VII. Graphics Applied to User Documentation

- A. Purpose
- B. Types
- C. Use

VIII. Styles of User Documentation

- A. Play Script
- B. Flowchart
- C. Text
- D. Text Flowchart
- E. Text-Picture
- F. Tabular
- G. Hipo
- H. Case Problem

IX. Contents of the User Manual

- A. Structure
- B. Segmentation
- C. Functionality
- D. Components
- E. Glossaries; Tables

X. Forms Design

- A. Instructions in Forms
- B. Multi-Purpose Forms

XI. CRT Screens and Self-Documenting Routines

- A. Format
- B. Keyboard Instructions
- C. Back-Up Documentation

User Documentation

American Institute for Professional Education

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Los Angeles, CA-May 4-5, 1981

Quality Inn
5249 West Century Blvd.
Los Angeles, CA 90045
213-645-2200

Portland, OR-May 11-12, 1981

Sheraton Inn Portland
8235 N.E. Airport Way
Portland, OR 97218
503-288-7171

Detroit, MI-May 18-19, 1981

Ramada Inn
8270 Wickham Rd.
Romulus, MI 48174
313-729-6300

Pittsburgh, PA-May 28-29, 1981

Pittsburgh Marriott
101 Marriott Dr.
Pittsburgh, PA 15205
412-922-8400

Rochester, NY-June 1-2, 1981

Marriott
5257 W. Henrietta Rd.
Rochester, NY 14623
716-359-1800

Philadelphia, PA-June 8-9, 1981

Philadelphia Marriott
City Line Ave. & Monument Rd.
Philadelphia, PA 19131
215-645-6604

REGISTRATION INFORMATION

COURSE FEES: The \$545 registration fee includes the seminar, Course Workbook and a Flowcharting Kit.

DISCOUNT SCHEDULE: Three to five registrations made concurrently from the same firm are entitled to a 10% discount. Six or more registrations are entitled to a 15% discount.

REGISTRATION: Attendance level is limited and sessions tend to fill up well in advance of workshop dates. To register, mail the registration form or phone 201-377-7400, 9 AM to 5 PM Eastern Time.

CANCELLATIONS: The registration fee is fully refundable up to three business days prior to the starting date of the seminar. All cancellations must be confirmed in writing. A charge of 50% to cover incurred expenses will be assessed for any cancellation after that date. Transfers and substitutions may be made at any time at no charge, providing substituted session is attended.

HOTEL ACCOMMODATIONS: Contact the hotel directly to reserve a room. A block of rooms will be held at the hotels listed above until two weeks prior to the seminar. Please identify yourself with The American Institute when making your reservation.

COURSE SCHEDULE: Classes are held from 9:00 A.M. to 5:00 P.M. each day.

GUARANTEE: All participants will benefit from this unique seminar/workshop. The American Institute for Professional Education

believes that **USER DOCUMENTATION** offers the best possible training available in this field. If, during the course, the participant notifies the instructor of his/her desire to withdraw, the attendee may leave and receive a full refund.

1.5 CEU'S AWARDED: The participants who successfully complete the course are awarded 1.5 Continuing Education Units. A certificate will be awarded upon request.

As the national standard for the recognition of non-university professional education, the CEU has been adopted by the extension divisions of over 600 colleges, by numerous professional associations, and by other specialized educational groups. A permanent record of CEU awards is maintained by The Institute.

ON-SITE TRAINING SESSIONS: For further information about sponsoring this workshop for groups of 15 to 30 professionals within your organization, please contact the Director of On-Site Sessions, Carnegie Press, 201-822-1084.

ABOUT THE INSTITUTE: The American Institute for Professional Education was founded in 1972. It is a non-profit organization serving the educational needs of business professionals. The American Institute strives to provide for the interdisciplinary needs of professionals in today's rapidly expanding technological fields through the creation of two and three day seminars/workshops. These seminars/workshops are offered throughout the United States, Canada and Australia. For a current listing of sessions available, call the Registrar at 201-377-7400.

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USER DOCUMENTATION

TYPE OF REGISTRATION

- ☐ Single \$545
☐ Multiple
(See discount schedule)

METHOD OF PAYMENT

- ☐ Check Enclosed
☐ Bill My Firm

CHOICE OF SESSIONS

- ☐ Los Angeles, May 4-5
☐ Portland, May 11-12
☐ Detroit, May 18-19
☐ Pittsburgh, May 28-29
☐ Rochester, June 1-2
☐ Philadelphia, June 8-9

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